



Industry Day Role Management for Industry - What's Next?



U.S. General Services
Administration



THE INTEGRATED AWARD ENVIRONMENT

- Reducing barriers for doing business with the Government
- Increasing transparency into federal spending
- Increasing accountability in the award process
- Reducing reporting burden
- Increasing data quality and integrity



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beta.SAM.gov | For People Who Make, Receive, and Manage Federal Awards

Agenda

- beta.SAM.gov is live
- Focus Groups
- Wireframes
- Next Steps
- Questions



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beta.SAM.gov is live!

- beta.SAM.gov is live and open to the public - take a look!
- The site coexists with SAM.gov and will eventually become SAM.gov - the authoritative source of federal award data in the future.
- Current operational systems running in parallel to beta.SAM.gov and **will remain the authoritative sources** until they are decommissioned.



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One Website with Award “Domains”

- CFDA → Assistance Listings
- FBO → Contract Opportunities
- FPDS → Contract Data
- SAM → Entity Information
 - Registrations
 - Exclusions
- WDOL → Wage Determinations
- FPDS Organization Data → Federal Hierarchy

**There’s no “FBO”
or “FPDS” or other
section of the
website organized
by legacy system**



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What You Can Do Now

- **Search** assistance listings, contract opportunities, contract data, entity registrations, entity exclusions, Federal Department/Independent Agency, Federal sub-tiers, and wage determinations.
- **Create a user account** with single sign-on for all of beta.SAM.gov.
- Learn about federal awards and how to use beta.SAM.gov in one **Help Center**.
- **Provide feedback** using the feedback tool.



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beta.SAM.gov - Demo

Live demo

- Home page
- Search
 - Across all domains
 - Across an individual domain
- Help Center
- Feedback tool



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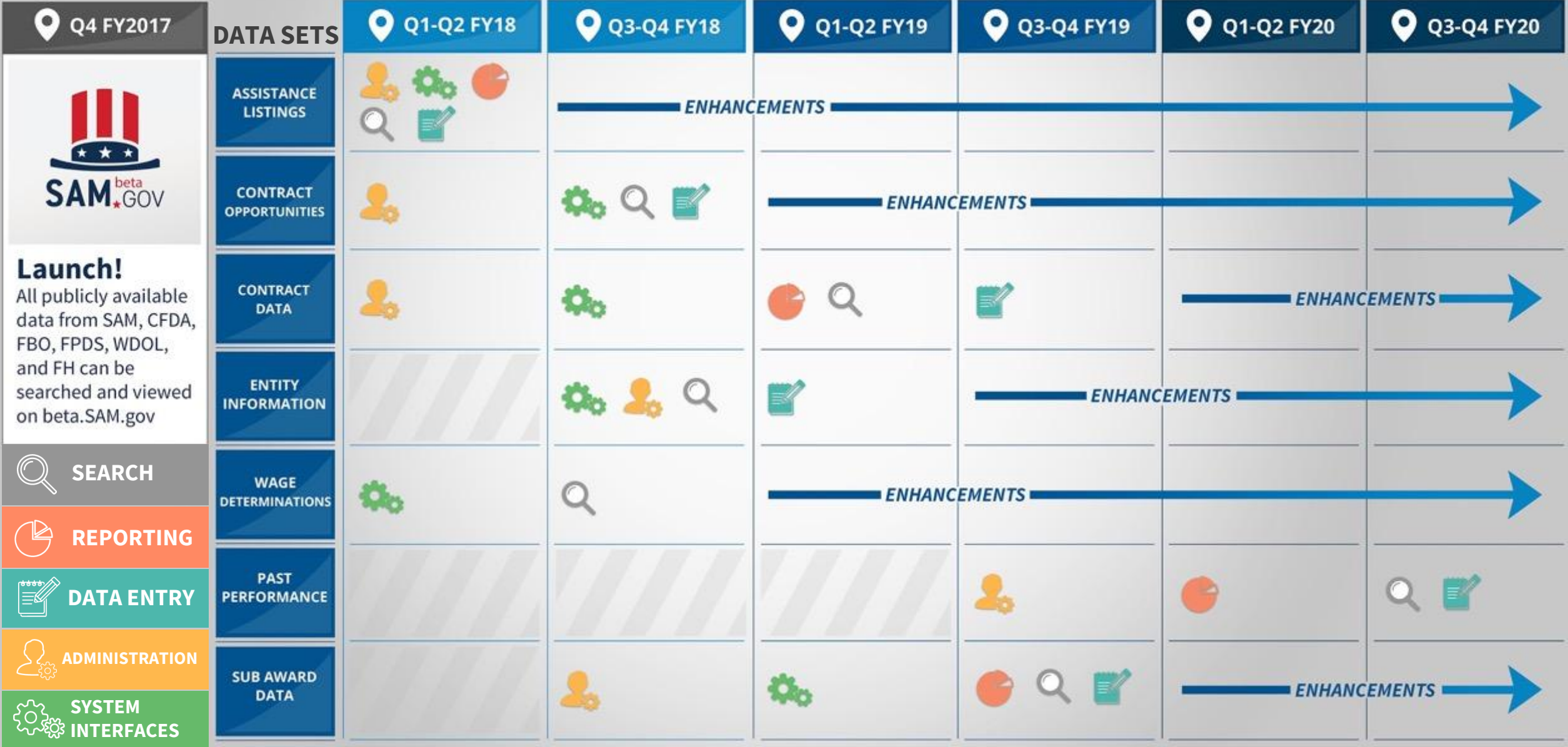
What's Coming Next

- Access the Federal Service Desk (FSD) web form directly from beta.SAM.gov.
- Sort search results, save searches, and use additional filters.
- View dynamic reports for contract award data.
- Migrate existing roles from legacy systems for assistance listings, contract opportunities, and contract data (Federal users).
- View, create, and update assistance listings (Federal users).



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Big Changes to Industry Role Management

- **Industry Roles and Permissions**
 - Complete overhaul of existing roles and permissions, defining roles and permissions that are aligned with organization of the new website.
- **Assigning Roles**
 - Standardizing how roles are assigned across the legacy application functionality.
- **Managing an organization across all entities, users, and data.**
 - Providing consolidated, high-level administrative capabilities for managing users and data across all your entities and all application functionality.



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Engagement with Industry

- 5 sessions in July and August
 - 54 participants
 - 2 large business sessions and 3 small business sessions
 - 4 remote and 1 in-person
- Past sessions for sub-awards, FPDS, and FBO
- Interviews covering all systems including SAM.gov and Past Performance systems
- Analysis of Federal Service Desk Issues



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Focus Group Topics

- Managing Your Users and Roles
- Managing Your Organization
- Workspaces
- Work Processes

For each topic, we asked for your:

- Pain Points
- Wish List Items



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Managing Your Users and Roles

Pain Points

- Finding, viewing, and editing user permissions is difficult.
- Losing access to accounts due to inactivity.

Wish List

- **One or two designated entity administrators who manage users and roles.**
- A clear view of all users at organization and easily edit permissions.
- Mechanism for connecting users to their entities.



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Managing Your Organization

Pain Points

- Entering duplicate data across multiple systems.
- Difficulty accessing past performance data.
- Difficulty searching for award information in FPDS.

Wish List

- Mechanism for handling company transitions (e.g., employees leaving, acquisitions).
- Company-wide past performance administration.
- Consistent and streamlined data entry
- View additional entity information (e.g., link the Interested Vendor list with contracts awards)



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Workspace

- A more effective, user-friendly search with the ability to:
 - Enter keywords.
 - Save past performance searches.
 - Share search results with other users in your organization.
- An easier way to track tasks and due dates.
 - Calendar of activities.
 - Central notification center with customizable alerts.
- Quick access to reports.
- System-recommended opportunities based on your profile.



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Work Processes

- “Contract management” versus “domain by domain” view.
- Many participants, particularly small business users, preferred the “rolled up” view of the Contract Management wireframe.
- Larger companies with many DUNS preferred the “domain by domain” option, because they have departments dedicated to each domain, and are more siloed.
- Most agreed that ideally, users would have access to both options.



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Wireframes

- All wireframes are draft examples of what features might look like and subject to change
- Wireframes are “conversation starters”
- Wireframes are snapshots - not complete stories




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Entity Administration



How should the hierarchy be built and maintained?

How are top level roles assigned?






[Workspace](#) > Entity Administration

Download  

Search



Status

☒ Active

☒ Draft

☒ Submitted

☐ Expired


Expiration Date

☐ Next 7 days

☐ Next 14 days

☐ Next 30 days

Clear Filters

 What you think matters!

Provide Feedback

You have [2 submitted registrations](#)


WORKSPACE


Entity Adminstration

Showing 1 to 10 of 16


Sort By

Expiration Date



Actions 

Submitted

Actions 

Pure Clean Federal, Inc

12849 Castle Drive
McLean, VA 20192

Entity Id
029302930

CAGE Code
0F930


Status
Active

Expiration Date
July 16, 2018

Purpose of Registration
All Awards

Debt Subject to Offset
No

Submitted

Actions 

Pure Clean Energy, Inc

12849 Castle Drive

Status
Active



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Permissions by Domain

What roles are needed?

What roles names should we use?

What permissions are required, recommended, or optional for each role?





[Profile](#) > [Roles](#) > Assign Role


PROFILE

New Request

Assign Role

Organization

Pure Clean Federal, Inc
293029323



Edit 

Role

Entity User

Required

Domains

Entity Registration  Sub-Awards 

Required

Entity Registration

Sub-Awards

Group 1		Group 2	
Permission 1	<input checked="" type="checkbox"/>	Permission 1	<input checked="" type="checkbox"/>
Permission 2	<input checked="" type="checkbox"/>	Permission 2	<input checked="" type="checkbox"/>
Permission 3	<input checked="" type="checkbox"/>	Permission 3	<input checked="" type="checkbox"/>
Permission 4	<input checked="" type="checkbox"/>	Permission 4	<input type="checkbox"/>



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Role Administrator: Global







How are roles
assigned?

Who in my
organization has
access - and to what?



Bulk updates?

What fields should
we display?







[Workspace](#) > Roles Administration

Download  

Users

Find User 

Entities

832 

Roles

☒ Administrator

☒ Domain Administrator

☒ Entity User

Domains

☒ Contract Opportunities

☒ Entity Registration


☒ Past Performance

☐ Sub-Awards


Status

☒ Active Only

[Clear Filters](#)

 What you think matters!

Provide Feedback


 You have [2 pending requests](#)


WORKSPACE

Role Administration


Showing 1 to 10 of 93

Sort By

Last Name 

Actions 

Request Pending


Actions 

[Amanda Achebe](#)
amanda.achebe@purecleanenergy.com

Organization
Pure Clean Federal, Inc

Status
Active

Active Date
July 16, 2018

Actions 

[Donald Aldam](#)
donald.aldam@purecleanenergy.com

Organization
Pure Clean Energy, Inc

Status
Active


Active Date
Sep 5, 2018







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Role Administrator: Entity/Domain Specific

Who in my
organization has
access - and to what?







[Workspace](#) > Roles Administration

Download  

Users

Find User 

Entities

Pure Clean Federal Inc 

Roles

☒ Domain Administrator

☒ Entity User


Domains

☒ Entity Registration


Status

☒ Active Only

[Clear Filters](#)

 What you think matters!

Provide Feedback


 You have [2 pending requests](#)


WORKSPACE

Role Administration


Showing 1 to 10 of 16


Sort By


Last Name 

Actions 

Request Pending

Actions 

Amanda Achebe amanda.achebe@purecleanenergy.com	Status Active
Organization Pure Clean Federal, Inc	Active Date July 16, 2018
Actions 	
Samuel Bernard samuel.bernard@purecleanenergy.com	Status Active
Organization Pure Clean Federal, Inc	Active Date Jan 12, 2019



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Role Administrator

What can Samuel do across the website?

Top-down management of access

Role History - when did Samuel receive access?

Who can see this?

[Workspace](#) > [Role Administration](#) > Samuel Bernard

Account Details

Reset Password

Roles

Role Migration


Subscriptions

Roles

- ☒ Administrator
- ☒ Domain Administrator
- ☒ Entity User

Domains

- ☒ Contract Opportunities
- ☒ Entity Registration
- ☒ Past Performance
- ☐ Sub-Awards

 What you think matters!

[Provide Feedback](#)

PROFILE

Samuel Bernard

Showing 1 to 3 of 3

Sort By [Organization](#)

[Assign Role](#)

Organization	Role	Domain(s)
Pure Clean Federal, Inc	Entity Administrator	N/A
Pure Clean Applied Solutions, Inc	Domain Administrator	Entity Registration Past Performance Sub-Awards
Pure Clean Energy, Inc	Entity User	Contract Opportunities

Role History



Jan 17, 2017 at 10:35am

[Role Approved](#)

Amanda Achebe approved the Entity User role for Pure Clean Energy, Inc

My Profile

What can a I do across the entire website?

Bottom-up requests for access

Role History - when did I receive access?

[Profile](#) > Roles

Account Details

Reset Password

Roles

Role Migration


Subscriptions

Roles

- ☒ Administrator
- ☒ Entity Administrator
- ☒ Entity User

Domains

- ☒ Contract Opportunities
- ☒ Entity Registration
- ☒ Past Performance
- ☐ Sub-Awards

 What you think matters!

[Provide Feedback](#)

PROFILE

Samuel Bernard

Showing 1 to 3 of 3

Sort By [Organization](#)

[Request Role](#)

Organization	Role	Domain(s)
Pure Clean Federal, Inc	Entity Administrator	N/A
Pure Clean Applied Solutions, Inc	Domain Administrator	Entity Registration Past Performance Sub-Awards
Pure Clean Energy, Inc	Entity User	Contract Opportunities

Role History



Jan 17, 2017 at 10:35am

[Role Approved](#)

Amanda Achebe approved the Entity User role for Pure Clean Energy, Inc

My Profile

Can users request roles?

What roles can they request?

What information do you need as part of the request?

[Profile](#) > [Roles](#) > Request Role

PROFILE

New Request

Request Role

Supervisor

Required

Name

Miranda Jones

Email

miranda.jones@purecleanenergy.com

Organization

Required

Pure Clean Federal, Inc
293029323



Role

Required

Entity User

Domains

Required

Entity Registration



Sub-Awards










Contract Workspace: Multi-Domain User

What you see is role driven.



How should it be organized?

What information do you want to see?





[Workspace](#) > Past Performance

Download  

All

Contracts

Sub-Awards

Past Performance

Bio-Preferred Reports

SCR Reports

Entity ID

Contract ID

Status

☒ Current

☒ Due

☒ Overdue

☐ Completed


WORKSPACE


Past Performance

Showing 1 to 10 of 16


Sort By

Due Date



Actions 

Waiting for Comments

Actions 

HPQ069K2012

DUNS Number

201920921

Assigned Date

Jun 7, 2017

Order Number

None


Due Date

Jun 19, 2017

Period of Performance

May 20, 2016 - May 19, 2017

Waiting for Comments

Actions 

KRP0992TL63

DUNS Number

Assigned Date



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Contract Workspace: Single Domain User

What you see is role driven.



How should it be organized?

What information do you want to see?





[Workspace](#) > Past Performance

Download  

Past Performance


Entity ID

Contract ID

Status

☒ Current☒ Due☒ Overdue☐ Completed

Clear Filters

 What you think matters!

Provide Feedback


WORKSPACE


Past Performance

Showing 1 to 10 of 16


Sort By

Due Date



Actions 

Waiting for Comments

Actions 

HPQ069K2012

DUNS Number201920921


Assigned DateJun 7, 2017

Order NumberNone

Due DateJun 19, 2017

Period of PerformanceMay 20, 2016 - May 19, 2017


Waiting for Comments

Actions 

KRP0992TL63

DUNS Number

Assigned Date



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Where we are now

- Preliminary wireframes for role administration and industry dashboard
- Performing data analysis
 - Analysis of existing roles, permissions and users
- Developing a transition plan
 - Process for associating data in the other systems with the entities in SAM?
 - Process for migrating roles to beta.SAM.gov (which systems are feasible, how would it work?)



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Workgroup Plan

- Intention is to maximize the time you spend participating
- Agenda sent out in advance - participate in those that interest you
- We will come to each session with a proposal/wireframes
 - Vision for creating entity relationships (hierarchy)
 - Proposed roles and permissions for each role, broken down by domain (contract opportunities, entity registration, etc)
 - Proposed administration processes
 - Proposed workspace/dashboard
- We will ask for
 - 90 minutes maximum of your time in a session
 - Virtual attendance
 - Validation of our proposal/wireframes, corrections, alternatives



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Participating in a Working Group

- Anyone from industry is invited to participate
- Challenging cases we want to make sure we have covered
 - Large businesses with a large number of entities to manage
 - Businesses who buy and sell entities
 - Businesses with responsibilities distributed among people who don't typically work together (ex: sub-awards versus entity registrations)
- Work groups will start in late October
- Outreach through some industry associations
- Want to join our working group? Email IAEOutreach@gsa.gov.



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Preparing for the Change

- Industry is drastically changing - in making this a seamless transition, we're dedicated to keeping you in the loop and want to hear your feedback, questions, and concerns. Check out beta.SAM.gov (especially the Help Center) and let us know what you think!
- Subscribe to Interact for updates on role management and other beta.SAM.gov progress.
- Attend IAE webinars in the upcoming months.



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Q&A



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The Integrated Award Environment

GSA Federal Acquisition Service
1800 F Street, Washington, DC
Email: IAEOutreach@gsa.gov

To Get Involved:

<https://interact.gsa.gov/group/integrated-award-environment-iae-industry-community>

For Developers to Stay Involved:

<http://gsa.github.io/openIAE>



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As a PTAC, it would be nice to be notified when followed vendors (our clients) receive contracts.

-- FPDS Focus Groups

“Awards are not listed in an intuitive way...it’s very difficult to find an award you just won.”

-- Sub-Awards Focus Group

It would be nice to be able to choose when the notification alerts come in.

-- FBO Focus Group

“As previously stated, a shareable dashboard that allows you to invite and exchange with company staff as well as potential partners.”

-- FBO Focus Group

I want to share information with my co-worker or small business protégé companies to see if they have seen it or are working on it.

-- FBO Focus Group

“My dashboard so I know what to report at any given time. A user-centric view to track the next set of reporting requirements, notify what is upcoming.”

-- Sub-Awards Focus Group

When I go to Zappos, it remembers who I am and what I looked at. Based on that history, it makes recommendations. What I am interested in, what I do. Here’s what has happened since the last time you were here so I have a place to start.

-- FBO Focus Group



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“It would be nice if it would recognize that we are the parent to all those [child DUNS] that we are trying to get access to. It would be nice to manage at the global level.”

-- Sub-Awards Focus Group

“Awards are not listed in an intuitive way...it’s very difficult to find an award you just won.”

--Sub-Awards Focus Group

“My dashboard so I know what to report at any given time. A user-centric view to track the next set of reporting requirements, notify what is upcoming.”

-- Sub-Awards Focus Group

“Entities are unable to aggregate logins/data/reports across multiple DUNS numbers.”

-- Sub-Awards Focus Group

“We have one login for the entry point into our data. It would be nice to have multiple users - master control at the organization level.”

-- Sub-Awards Focus Group



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“[I’d like to see a] dashboard for a company for the whole site. Make one or two authorized people from the company who are authorized to allow different people to access different parts of the website.”

“We recently acquired another company and trying to figure out who had access to what was a nightmare.”

“In the SAM system I find it very difficult to see which entities a person is connected to. This is important when someone leaves the company and wanting to quickly see what they were associated with.”

“[There’s] no way to understand which people in the company have access to which info in which websites.”

“For sub-awards, we have one login for the entry point into our data. It would be nice to have multiple users - master control at the organization level.”



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